

Course Outline for “SFA Traditions: Celebrating Our Mission” (Draft 10/6/00)

Course Objectives: Following participation in “SFA Traditions,” SFA employees will:

- (1) See the student aid process through the student’s eyes;**
- (2) Understand the basic steps that a student must go through to secure financial aid;**
- (3) See how we help people reach their dreams and how millions of people reaching their dreams strengthens America;**
- (4) Own SFA ‘s mission and standards and understand how all that we do is guided by them.**

Time	Content/Activity	Desired Results	Comments
8:30 - 9:00	FAFSA and SAR Processing <ul style="list-style-type: none"> Attention getting role-play Placing participant in the moment- (as an individual seeking information on student financial assistance) Introduction of FAFSA <ul style="list-style-type: none"> Facilitator-Financial Aid Representative Team activity-question book 	<ul style="list-style-type: none"> Participants feel welcome and are surprised and curious. Participants enter into a simulated environment placing them in the role of individuals going through the process of seeking aid. Participants assume different student identities. Participants relate to the student’s experience in applying for student aid, including filling out the FAFSA form. 	<ul style="list-style-type: none"> As participants enter the room, they are personally greeted, given materials and nametag, and asked to take a seat by facilitator in the role of financial aid rep. Participants will enter a simulated environment of a community meeting. They encounter a Financial Aid Representative, who answers their questions regarding the financial aid application process.
9:00 – 9:30	Why Are We Here? <ul style="list-style-type: none"> Stop the action Greg Woods video (3 minutes?) Review course objectives Review plan for the day Introductions 	<ul style="list-style-type: none"> Participants understand why they are attending the course and what the day will be like. Participants get introduced to each other. 	<ul style="list-style-type: none"> Greg speaks to need for aligning and connecting employees around mission and 4 standards. Acknowledge what SFA is doing right. Participants will have the opportunity to experience learning individually, and in groups. We want to create an interactive learning environment, with the opportunity to meet the stated course objectives. Have each participant introduce themselves by their name, work unit and student aid experience.
9:30 – 10:00	The Heritage of SFA: Honoring the Past <ul style="list-style-type: none"> Lecturette and Discussion using Power Point – timeline, trends and figures Heritage Video 	<ul style="list-style-type: none"> Participants feel pride in their heritage. Participants understand why SFA was created as a federal agency by Congress; historical context in evolution of student aid programs, Participants learn about trends in student aid and the various interests served. Participants understand the magnitude of the impact of SFA – facts and figures showing growth and trends. Participants emotionally connect to SFA heritage. 	<ul style="list-style-type: none"> Provide an historical perspective on how and why SFA came into being and evolution of aid programs. Help participants see that they are part of something really big.

10:00 – 10:15	BREAK		
10:15 – 11:30	SFA As A PBO: The Four Standards <ul style="list-style-type: none"> • Mini-lecturette – Customer Service analogy; Personal story; Importance of the four standards. • Case Studies – At their tables, participants discuss a case study and apply four standards to devise solutions. • Debrief in large group. 	<ul style="list-style-type: none"> • Participants relate to customer service expectations through everyday examples. • Participants understand the importance of the four standards in SFA's transformation to a PBO. • Participants understand how to apply the four standards to enhance the students' experience. 	<ul style="list-style-type: none"> • The 4 standards are: <ul style="list-style-type: none"> * Be worthy of trust * Be courteous * Deliver great products and services * Be efficient (in that order of importance)
11:30 – 12:00	RECAP ACTIVITY <ul style="list-style-type: none"> • “Who Wants to be a Millionaire” Game 	<ul style="list-style-type: none"> • Participants review learning points from the morning in a fun way. 	<ul style="list-style-type: none"> • Teams compete from their tables.
12:00 – 1:00	LUNCH		Lunch is provided.
1:00 – 1:45	Student's Financial Aid Package <ul style="list-style-type: none"> • Student's Offer and Financial Aid Package <ul style="list-style-type: none"> • Award letters- Case Studies • Application of 4 standards 	<ul style="list-style-type: none"> • Participants relate to the student's experience in having a financial aid package constructed for them. • Apply the 4 standards to the overall impact of the financial aid package 	<ul style="list-style-type: none"> • Aid packaging process is an opportunity to redefine “moment of truth” in the eyes of our student/customer and use the 4 standards .
1:45 – 2:00	Financial Aid Reapplication and Loan Repayment <ul style="list-style-type: none"> • Reapplication and Repayment Lectures • Debrief and Transition; Application of 4 standards 	<ul style="list-style-type: none"> • Participants will gain additional knowledge on the process, connections, timelines and cost factors of student financial assistance. • Apply the 4 standards in the area of reapplication and repayment 	<ul style="list-style-type: none"> • Provide a clear perspective of the impact of reapplication and repayment. • Provide an opportunity for the participant to receive information in a succinct manner • Help participants see the impact of decisions from the student perspective
2:00-2:15	BREAK		
2:15-3:00	Financial Aid Reapplication and Loan Repayment (cont'd) <ul style="list-style-type: none"> • Reapplication and Repayment <ul style="list-style-type: none"> • Jeopardy Game • Reflection-Re-cap • Debrief and Transition; Application of four standards 	<ul style="list-style-type: none"> • Participants will review the financial aid process from the student perspective. • Participants will have an opportunity to reflect and make personal connections. • Participants will discuss and connect the 4 standards to the process. 	<ul style="list-style-type: none"> ♦ Participants will have a clear understanding of the student financial assistance process, which they can impart to others in an interactive collaborative way. ♦ Participants will have an opportunity to reflect and make personal connections (moments of truth)
3:00 – 3:30	Making A Difference: It Starts With Me <ul style="list-style-type: none"> • Personal commitment – What can I be doing to foster and uphold the four standards? • Share at your tables. • Evaluations 	<ul style="list-style-type: none"> • Participants apply the four standards to their own situations. • Participants feel they have a personal stake in the transformation of SFA. • Feedback is received. 	<ul style="list-style-type: none"> • Participants make a personal commitment to the four standards.

3:30 – 4:00	Wrap-Up & Graduation <ul style="list-style-type: none"> • Student Stories Video • Closing Ceremony - Circle of Words • Graduation – presentation of certificates and cards 	<ul style="list-style-type: none"> • Participants make personal connections to student stories. • Participants feel a common bond with their colleagues around the SFA mission and standards. • Participants receive certificates and laminated cards. 	<ul style="list-style-type: none"> • Video will highlight individual students' stories about their experience with SFA and the importance of student aid to their lives. • Personal stories enhance the connections to student stories. • Participants stand in a circle and each one in turn recites a single word capturing the essence of their day's experience. • Present certificates and cards individually. • Collect feedback on extent to which course objectives were achieved, what went well, what could have gone better. • Thank participants for attending.
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